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## MBA PROFESSIONAL REPORT

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**Marine Corps Contingency Contracting MCI**

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December 2003**

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**MARINE CORPS CONTINGENCY CONTRACTING MCI**

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# **MARINE CORPS CONTINGENCY CONTRACTING MCI**

## **ABSTRACT**

Contingency contracting is the process where vital supplies and services needed to maintain deployed forces are obtained on behalf of the United States Government. These actions are used for emergencies, such as, disaster relief from hurricanes or from terrorist activities that occur within the United States or for actions that occur outside of the United States in order to support the deployed units. Due to the current trend in the DoD to contract out more products and services on the battlefield, an increase demand has been placed on contingency contract personnel.

The purpose of this MBA Project is to develop and publish a Contingency Contracting MCI to assist the Marine Corps in training its contract personnel in preparation for deployment to a contingency operation. Currently there is not a requirement for the contracting specialist to attend a formal school prior to supporting a contingency operation. Furthermore, there are limited spaces for Marines to attend CON 234. The Contingency Contracting MCI will aid the contracting personnel with the training needed to be successful in a contingency environment and efficiently and effectively support Marine Corps units abroad. This project was sponsored by Headquarters Marine Corps, Installation & Logistics, Logistics Branch in conjunction with the Marine Corps Institute (MCI). The MBA Report has identified several problems in the current ability of the Marine Corps to train contracting personnel in contingency contracting and provides recommendations for further study. A draft Contingency Contracting MCI is included in the report.

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## **EXECUTIVE SUMMARY**

The use of contingency contracting has increased dramatically over the past several years, and the Marine Corps is slowly adjusting to meet the new requirement. Recently a dramatic shift has occurred in how forces are employed and how those forces are supported. The focus now is on the warfighter with as limited a logistical tail as possible. Contingency contracting is the link that allows forces to deploy more rapidly because of the reduced footprint.

The current organization of the Marine Corps' contracting workforce is not structured to meet the increasing demands of contingency contracting. There is an insufficient number of contingency contracting billets along with limited contingency contracting training. This MBA report focuses on the training aspect of preparing contracting personnel for contingency operations.

Contracting personnel are one of the links that assists the deployed warfighter in acquiring the required supplies and services they need. They are needed to obligate funds as a direct representative of the U. S. Government and ensure that full and open competition and fair and reasonable prices are being obtained for the products and services the military requires to accomplish the mission. Contracting personnel, who are operating in a contingency environment, must be skilled in his or her duties because they will not have sufficient oversight while conducting day-to-day business arrangements. In many instances, they are the only Marines that have the authority and expertise to provide the supplies and materials needed to accomplish the mission. Contracting personnel must uphold the rules and regulations that govern their business transactions and understand the foreign environments that may be unfamiliar, such as, foreign business practices, cultures, and language barriers.

The importance of having a trained contingency contracting officer (CCO) cannot be under emphasized. However, although the importance of a skilled CCO is understood, the current contracting workforce does not possess the internal capability to train its personnel for contingency operations. There is no formal training or school that Marines attend before laterally moving into the contracting specialist field. The Marines are

selectively chosen through a series of prerequisites and requirements that will provide the Marine Corps with skilled and reliable personnel. Upon selection, the contracting specialist training process begins with OJT for a period of six months at a Regional Contracting Office (RCO). He or she then will continue the education and training through DAWIA courses that are offered through the Defense Acquisition University (DAU). Currently, the only formal contingency contracting training that Marines can get is through a DAU sponsored course called CON234. Although a superior course, access to it has been limited through both internal and external factors.

This report has identified five causes to the shortage of contingency contracting training currently affecting the Marine Corps contracting workforce. These causes are:

1. No Formal School Training
2. No Web-Based or Self-Guided Study
3. No Direct CON234 Supervision
4. No In-House Contingency Contracting Training
5. Small Contracting Specialist Population

In response to the causes the following recommendations have been made:

1. Attendance at the Entry Level Air Force Contracting School
2. Develop and Publish Marine Corps Contingency Contracting MCI
3. Increase CON234 Quota Management
4. Establish a Mobile Training Team (MTT)

Although our report identifies five potential causes to the lack of contingency contracting training, and recommendations to address some of those causes, the preponderance of our efforts for this report was in constructing a self-guided study. This self-guided study was a cost effective way of assisting the Marine Corps in minimizing the current contingency contracting training deficiency.

## **I. BACKGROUND ON THE STATUS OF CONTINGENCY CONTRACTING WITHIN THE USMC**

### **A. WHAT IS CONTINGENCY CONTRACTING**

Contingency contracting is the process where vital supplies and services needed to maintain deployed forces are obtained on behalf of the United States Government. Contingency contracting will encompass emergencies involving military forces caused by natural disasters, terrorists, subversions, or by required military operations. The Secretary of Defense normally designates a contingency when members of the Armed Forces become involved in military actions against an enemy of the United States. Congress or the President may also declare a contingency during a declared war or national emergency. Contracting personnel assist the warfighter in acquiring necessary supplies and services that are required. The specific mission of the Contingency Contracting Officer is to:

Responsively, effectively, and legally contract for, or to contract for the providing of, the supplies, services, and construction necessary to support the mission of the supported organizations.<sup>1</sup>

Over the past several years the use of contingency contracting has increased. This has been due to the United States' participation in the "War on Terror" and a focus on conflicts that have occurred in urban environments. Another contributing factor to the increase in contingency contracting has been the desire to rely more heavily on contractors for logistical support, shrinking the internal support that has normally been provided by the various military departments own support structures.

### **B. WHY CONTINGENCY CONTRACTING IS IMPORTANT**

In order to provide goods and services to deployed forces in an expeditious manner, without reliance on internal logistical trains, contingency contracting is required. Contingency contracting provides the necessary link between required resources that help outfit and support units in the field. With an emphasis on contingency contracting, warfighters can more easily be deployed within short notice, and can be sustained without

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<sup>1</sup> Naval Contingency Contracting Handbook, NAVSUP publication 713, pg 1.

the large logistical tail it normally requires. Another benefit that cannot be overlooked is the effect that contingency contracting has on the local economy where the contingency operation takes place. This ability to “prime the pump”, providing much needed vitality to fallen economies, assists in rejuvenating local markets. This ability to support the local infrastructures brings stability, which in turn leads to less chaos.

Contingency contracting personnel are required more on the battlefield than ever before because of the number of threats and their widespread locations throughout the world that currently threaten the United States and other allied nations. The current policy to defend the world of terrorism stretches our capabilities to the limits. The Marine Corps is currently working in operations, such as, Iraqi Freedom, where contracting personnel are needed in the theatre of operations. They are needed to support the Marines and to aid the nations that are declared a contingency with regards to equipment, food, water, infrastructure, and other services to enhance and support the capabilities to overcome the aggressors. The contracting personnel are able to expedite products and services that are needed by the warfighter in order to accomplish the mission, both legally and efficiently.

### **C. NEED FOR SPECIALIZED CONTINGENCY CONTRACTING PERSONNEL**

Currently, the Marine Corps has deployed 46 percent, almost half, of its contracting personnel in order to support the operations tasked by higher headquarters. Contracting personnel are needed to obligate funds as a direct representative of the U. S. Government and to ensure that full and open competition and fair and reasonable prices are being obtained for the products and services the military requires to accomplish the mission. Without obtaining fair and reasonable prices that the prudent businessman would accept, the Department of Defense will be placed under scrutiny by the taxpayers for misappropriating and wasting funds that the taxpayers, in essence, provide. Iraq is just one example of an operation that requires contracting support. Furthermore, many other threats within the Middle East and Pacific Rim nations may require military action in the future, potentially requiring various forms of contracting support. With these added threats on the horizon, the Marine Corps must train, and be ready to deploy, more

contracting personnel to better support the warfighter in the field to protect the nation's interests.

There are many laws, executive orders, regulations, and rules that the contracting officer must comply with in order to ensure a contract is legitimate and lawful in nature. There are numerous references the contracting officer must use to properly administer a contract. Some of the major references are the Federal Acquisition Regulations (FAR), the Defense Federal Acquisition Regulations Supplement (DFARS), the Marine Corps Purchasing Manual, and the Contingency Contracting Reference Book (CON 234). However, there are many more, and due to the location and political environment of the contingency, there may be new situations that are not adequately covered by existing references. Contingency contracting personnel must be knowledgeable in contracting procedures and skillful at soliciting, preparing, and executing contracts in an austere environment.

Marine Corps units have the capabilities to quickly and adequately obligate funds by using the Government Commercial Purchase Card (GCPC) program, up to \$2500. These obligations can be made within the continental United States (CONUS) or outside the continental United States (OCONUS). However, when the requirements surmount to costs above \$2500 or the location of the contingency cannot support the use of credit cards, a contracting officer is the individual required to obligate Government funds. The contracting officer is provided a specific warrant that enables him or her to obligate these Government funds. He or she is a direct representative of the U. S. Government and is expected to act in accordance with the regulations with integrity and fairness. There can be great criticism towards the U. S. Government if the contracting officer does not act accordingly to the roles and responsibilities of the position. Contracting personnel, who are operating in a contingency environment, must be skilled in their duties because they will not have sufficient oversight while conducting day-to-day business arrangements. In many instances, they are the only Marines that have the authority and expertise to provide the supplies and materials needed to accomplish the mission. Contracting personnel must uphold the rules and regulations that govern their business transactions and understand

the foreign environments that may be unfamiliar, such as, foreign business practices, cultures, and language barriers.

#### **D. WHO PERFORMS CONTINGENCY CONTRACTING**

The individuals who perform contingency contracting within the Marine Corps are the contracting officers (military occupational skill 9656) and the contracting specialists (military operational skill 3044). Although 25% of the contracting personnel billets are designated as contingency contracting positions, all contracting officer and specialist billets are considered deployable even if they are assigned to a Regional Contracting Office or other base units. Any Marine contracting officer or specialist can be assigned to a deploying unit outside the United States to support a contingency operation. Therefore, contracting personnel must have the knowledge and expertise to operate in any environment and be able to understand the rules and regulations of contingency operations to better support the warfighter.

##### **1. Population Statistics**

There are currently 122 purchasing and contracting specialists and contracting officers in the Marine Corps. Less than half of the individuals, 43 percent or 53 Marines, have attended the contingency contracting course, CON234 (this statistic will become more useful upon explanation of the significance CON234 currently plays in training contingency contracting personnel). In addition, 46 percent or 56 Marines have participated in a contingency operation while only 25 percent or 30 of the Marines billets are designated contingency contracting positions. See Table 1 below for a breakdown of the number of purchasing and contracting specialists and contracting officers:

Table 1: Purchasing and Contracting Specialist and Contracting Officer Statistics

	<b>Enlisted</b>	<b>Officer</b>
<b>Population Size</b>	103	19
# Attended CON234	46	7
# Participated in Contingency Operation	47	9
# Contingency Billet Holders	27	3

*Source: HQMC, Installation & Logistics, Logistics Branch*



The attrition rate for the purchasing and contracting specialists is approximately 13 Marines per year. The reasons for the attrition are retirement, separation, promotion to first sergeant, commissioning, or entering into the Warrant Officer program.<sup>2</sup>

## **2. Population Demographics**

The 103 purchasing and contracting specialists are located and assigned to 33 different units throughout the world. See Table 2 below for the locations of the Marine units and the number of Marine contracting specialists assigned to each command.

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<sup>2</sup> Email with Installations & Logistics Branch (LB) contracting personnel, 22 October 2003.

Table 2: Demographics of the Purchasing and Contracting Marine Personnel

<b>Location</b>	<b>Strength</b>
MCB Quantico	4
MCB Camp Lejeune	8
MCB Camp Pendleton	4
29 Palms	8
MCRD PISC	4
MCRD San Diego	2
MCLC Barstow	1
MCAS Cherry Point	2
MCAS Miramar	2
MCAS Yuma	1
MCMWTC Bridgeport	1
MCLC Albany	9
MARCORSYSCOM, Quantico	2
MCB Camp Butler, Okinawa	8
MARFORPAC, Camp Smith	3
MARFORLANT, Norfolk	2
1 <sup>st</sup> FSSG, Camp Pendleton	9
2 <sup>nd</sup> FSSG, Camp Lejeune	8
3 <sup>rd</sup> FSSG, Okinawa	7
4 <sup>th</sup> MEB HQ, Camp Lejeune	2
MARFOREUR, Stuttgart	1
MARFORSOU, Miami	1
Blount Island, Florida	1
MARFORRES, New Orleans	6
MATSG Pensacola	1
HQMC	3
CBIRF, Indian Head	1
KCMO, Kansas City	2
<b>Total</b>	<b>103</b>

*Source: HQMC, Installation & Logistics, Logistic Branch*

#### **E. PURCHASING AND CONTRACTING SPECIALIST (3044) TRAINING**

Since the contracting specialists makes up the majority of deployed contingency contracting officers for the Marine Corps, a discussion of the required skills to enter the occupation and the current training they undertake is discussed.

## **1. 3044 Qualifications**

Enlisted Marines, between the ranks of sergeant and master gunnery sergeant, that are Purchasing and Contracting Specialists possess the Military Occupational Specialty (MOS) code of 3044. They must hold certain qualities and skills to be able to work “independently and be objective in applying purchasing and contracting laws and regulations in daily activities.”<sup>3</sup> There is no formal training or school that Marines attend before laterally moving into the contracting specialist field. The Marines are selectively chosen through a series of prerequisites and requirements that provide the Marine Corps with skilled and reliable personnel. The required prerequisites for the 3044 are outlined in the Military Occupational Specialties Manual as defined by HQMC, Installations & Logistics, Logistics Branch. The prerequisites are reviewed annually and updated accordingly. The following are the requirements or prerequisites to become a Purchasing and Contracting Specialist. These may only be waived on a case-by-case basis<sup>4</sup>

- Must possess a GT score of 110 or higher.
- Must be interviewed and recommended by the Regional Contracting Officer. Regional Contracting Officer must be Military Occupational Skill (MOS) 9656 or civilian 1102 equivalent.
- Must be at least a sergeant with less than 2 years time in grade, on second or subsequent enlistment with primary MOS 3043, Supply Administrative Clerk, when recommended by the Regional Contracting Officer.
- No convictions by court-martial, civilian courts, or nonjudicial punishment of any act involving larceny, fraud, or theft.
- Must demonstrate excellent communicative skills, both verbally and in writing. Communication skills will be gauged during initial screening conducted by the Procurement Chief. This may also include the submission of a one page written essay on a business related topic at the Procurement Chief's discretion.
- Must have a minimum of 36 months of obligated service upon completion of on the job training (OJT) and assignment of intended MOS of 3044. Marines must request an extension of obligated service in order to comply with this obligation.
- Must have a general aptitude for computers, the Marine Corps standard office software suite and basic office machines.

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<sup>3</sup> Military Occupational Specialties Manual, April 2003, pg 3-203.

<sup>4</sup> Ibid, pg 3-203 and 3-204.

- Lateral move requests shall be approved through Occupational Field (OccFld) sponsor (Code LBP).
- Marines who lateral move into this MOS will be assigned MOS 3000 with an intended MOS of 3044. Marines will be assigned to a Regional Contracting Office for a period of 6 months for OJT. After successful completion of OJT and upon the recommendation of the Regional Contracting Officer, these Marines will be assigned MOS 3044.
- If after the Marine is assigned the 3044 MOS and is found unable to maintain procurements performance standards or for within the first 24 months of being assigned to a Regional Contracting Office, the Regional Contracting Officer can submit a request to CMC (MMEA) requesting to administratively drop the Marine from MOS 3044, back to their original MOS or another as determined by MMEA. Unless dropped for cause, redesignation should not be detriment to the Marine's career.
- Marines assigned the 3044 MOS are members of the DoD Acquisition Workforce and must meet statutory education, training and experience standards under the Defense Acquisition Workforce Improvement Act (DAWIA), as prescribed by DoD 5000.52-M DoD Acquisition Career Development Program, and as implemented by SECNAVINST 5300.36 Department of the Navy Acquisition Workforce Program. Thus, the extent an applicant has completed college courses will be considered favorably for eligibility. DAWIA certification requirements by grade are described in the following paragraphs.
- Sergeants must complete Level I DAWIA standards to be eligible for certification in the contracting career field at Level I. Prerequisites for certification at Level I in the contracting career field require either a baccalaureate degree from an accredited educational institution authorized to grant baccalaureate degrees, or have completed at least 24 semester hours (or the equivalent) of study from an accredited institution of higher education in any of the following disciplines: accounting, business, finance, law, contracts, purchasing, economics, industrial management, marketing, quantitative methods, and organization and management; and completion of mandatory contracting courses, or DoD equivalency courses, specified for Level I; and one year of experience in a contracting position.
- Staff sergeants through gunnery sergeants must have completed Level II DAWIA standards to be eligible for certification in the contracting career field at Level II. Prerequisites for certification at Level II in the contracting career field require fulfillment of the prerequisites for Level I DAWIA certification; and completion of mandatory contracting courses, or DoD equivalency courses, specified for Level II; and two years of experience in a contracting position. In addition, staff sergeants and gunnery sergeants are strongly encouraged to continue their professional development through the continuation of undergraduate study beyond the minimum 24 semester credit hours required for Level I DAWIA certification.

- Master sergeants and master gunnery sergeants must have completed Level III DAWIA standards to be eligible for certification in the contracting career field at Level III. Prerequisites for certification at Level III in the contracting career field require fulfillment of the prerequisites for Level I and Level II DAWIA certification; and completion of mandatory contracting courses, or DoD equivalency courses, specified for Level III; and four years in a contracting position. In addition, master sergeants and master gunnery sergeants are strongly encouraged to continue their professional development through the continuation of undergraduate study beyond the minimum 24 semester credit hours required for Level I DAWIA certification.

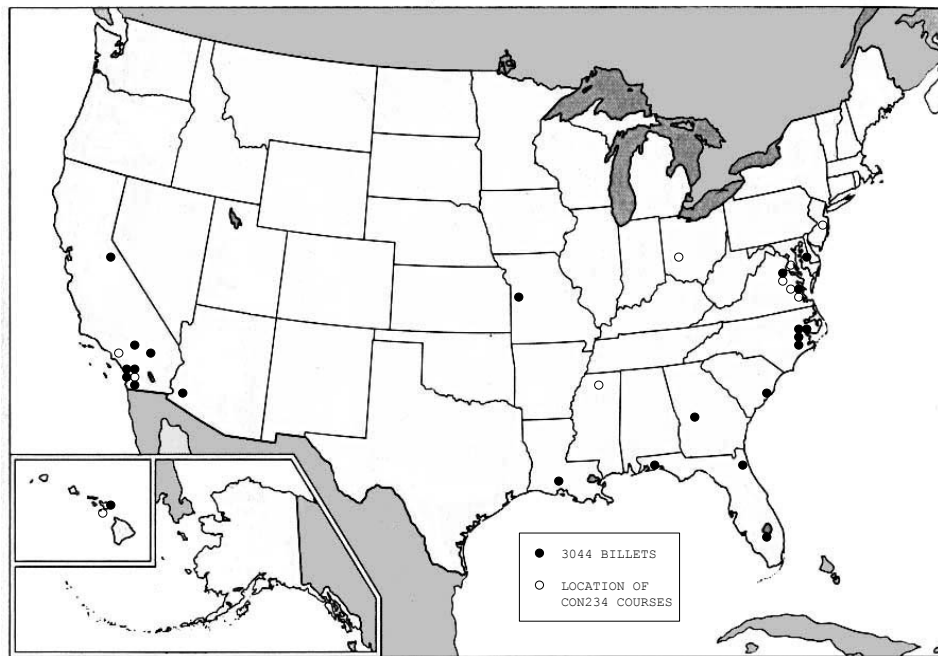
The contracting specialist (3044) training process begins with OJT for a period of six months at a Regional Contracting Office (RCO). He or she then continues the education and training through DAWIA courses that are offered through the Defense Acquisition University (DAU).

## **2. CON 234**

The contingency contracting course offered by DAU, also known as CON234, is one of the only contingency contracting courses offered by any of the services. Each year the Marine Corps obtains quotas to attend the course, with the number of school seats determined by the percentage of personnel in the acquisition workforce. The Navy manages the quotas for both the Navy and Marine Corps and registration for the course is on a first-come, first-served basis through the Navy DAU Registrar. Normally, DAU provides the travel funding for the courses they administer, but in situations where funding is unavailable, HQMC Installation & Logistics has at times provided the money. The funding is only provided for those individuals that require DAWIA certification.

Since the purchasing and contracting personnel (3044) are spread throughout the globe, it would be advantageous to the Marine Corps if the Defense Acquisition University provided CON234 course offerings in close proximity to where the preponderance of the Marines requiring the training were located. Figure 1 illustrates the location of FY04 CON234 course locations in relation to the location of where contracting specialists in the Marine Corps are located. The map only depicts CONUS courses; however, CON234 is also being offered in Bahrain and Germany.

Figure 1: Location of CON234 Offerings in Relation to Contract Specialist Billets



*Source: Author*

Other than attendance to CON234, Marines in the various contracting offices receive no formal contingency contracting training. The contracting office determines whether a Marine is given the opportunity to attend CON234. This decision is made by the head of the contracting office and is normally based on current workload and requirements faced. There is currently no organization outside of each field contracting offices chain of command that can mandate Marines attendance to the contingency contracting course.

## **II. METHODOLOGY**

### **A. METHODOLOGY USED TO DISCOVER THERE WAS A PROBLEM**

In the fall of 2002, our project team discovered a need for the creation of a training tool that would assist Marine contracting personnel in preparation for conducting contracting in a contingency environment. We perceived this training need after we were exposed to the world of contingency contracting through a course offered by the Contract & Acquisition Curriculum at the Naval Postgraduate School (NPGS). During our course study we realized that there was no training provided by the Marine Corps and no Marine specific references on the topic of contingency contracting. The only guidance given on contracting in a contingency environment was provided in an annex found in the Marine Corp Purchasing Manual. This guidance although helpful, was very limited in scope. We began consulting with Marine contingency contracting officers and approached the head of the contracts division at HQMC to discuss the issue. Upon further research it was verified that indeed the Marine Corps was very limited in its ability to train Marines for contracting in a contingency environment. Upon further discussion with the contracts division, our project team suggested that a self-guided study on contingency contracting be published to assist in fulfilling the current training void.

### **B. DATA COLLECTION – FIELD RESEARCH COBRA GOLD**

The data collected to formulate the contingency contracting correspondence manual was in the form of reviews of current federal laws, executive orders, and DoD and military department's regulations, directives, and references. Further research was conducted through phone interviews and email correspondence with key individuals within HQMC contracts division and current Marine contingency contracting personnel. A large portion of the research was conducted during field research that was done during exercise Cobra Gold held in Thailand.

The contingency contracting office that was observed supported the US Joint military forces that were participating in the multinational training exercise Cobra Gold. Cobra Gold included joint-combined land and air operations, combined naval operations,

amphibious operations, and special operations. The exercise also provided medical and civil affairs projects throughout Thailand.

### **1. Purpose of the Trip**

Traveling to Bangkok to witness the joint contingency contracting office was meant to fulfill many purposes relating to the MCI project. First, our team members would get a chance to view contracting procedures first hand. Second, we would be able to meet actual contingency contracting officers and personnel and conduct one-on-one interviews. Third, we would be able to gather resources such as standard operating procedures, office policy letters, and points of contacts for referencing. Finally, it would provide our team with an experience base to assist in the process of creating the MCI manual.

### **2. Actions Taken**

While attending Cobra Gold, our team witnessed the operations of the contingency contracting office. The field office was made up of approximately 18 soldiers, airmen and Marines, both enlisted and officers. The office conducted contingency contracting support for several thousand troops on a multitude of missions. The office contained not only contingency contracting officers, but also logistics representatives, financial officers, ordering officers, an interpreter/secretary, and a commanding officer. Witnessing the organizational structure of the contracting office allowed us to understand the contracting process more clearly and enabled us to write with experience and knowledge. This was truly a benefit considering none of us had any contracting experience.

The Cobra Gold contingency contracting office was an ideal environment to witness the organizational structure, and contracting procedures. The office was divided functionally. One function contracted port handling and transportation for the exercise, while another purchased food and water. Other functions involved service contracts, buildings, fuel, and special operations. Any items that the military was not able to obtain through the normal supply system was requested by the Logistics Representatives, contracted by the contracting officers, and paid for by the financial officers in the office.

Our team spent a few days conducting interviews with members of the contracting office. From the interviews we learned about their jobs, billet descriptions, job



background, and views of how the procedures and organization worked at the Cobra Gold contracting office. The contracting officers, logistics representatives, financial officers shared experiences, problems and successes that occurred in the office. From these personnel our team collected various tools, job aids, contracting forms, and standard operating procedures. These items were very helpful in the creation of the MCI.

The Cobra Gold contracting office used Procurement Desktop Defense (PD2), an electronic contract writing system. PD2 is used to systematically record, administer, and facilitate contracts. Our team had an opportunity to go through the process with the Marine contracting officer. He was the head contracting officer in the office and was responsible for the actions of all Marine contracting personnel.

Funding for the contracts is a fundamental and vital element of the contracting process. Our team was able to witness first hand the procedures used for funding. The process was new to our team and viewing the process helped clarify questions regarding the fiscal system.

## **C. MCI DEVELOPMENT**

### **1. Meeting with MCI Representatives**

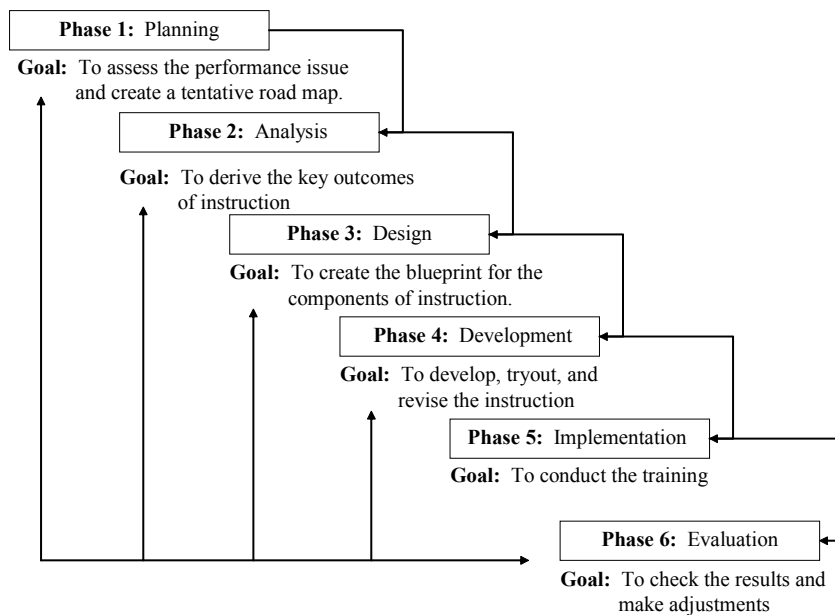
Initial contact was made with the Marine Corps Institute (MCI) located in Washington D.C. to see if they would assist our project team in developing the educational tool meant to assist Marine CCO's, and other Marines that deal with contracting. MCI agreed to be a joint partner in the project. They agreed to our project team writing the training manual, while MCI and the team together would edit, plan and organize the manual. Once complete, MCI would publish and distribute it through the institute's normal distribution channels. MCI promptly assigned a Supervisory Institutional Specialist and an Assistant Director of Publications to the project team.

In June, MCI representatives flew from Washington D.C. to NPGS to meet with our team. The principle reasons for meeting was to establish a common understanding of what the project entailed, and to build a rapport amongst the team members who were to work together for several months. Together, we developed a timeline for the completion of various phases and deliverables. We were also taught the MCI publications process on how to create and write a correspondence manual.

## 2. Instructional System Design (ISD)

Once our team had gathered data and located sources and references, we were ready to begin applying the Instructional System Design (ISD). ISD is the process used by MCI to make training manuals. There are six phases to the process: Planning, analysis, design, development, implementation and evaluation. The process is illustrated in Figure 2.

Figure 2: Graphic Illustration of the Instructional System Design



*Source: Instruction System Design Job Aid*

### a. Planning

During the planning phase, our team followed the ISD steps provided by MCI. We established goals for the team to accomplish and determined the roles and responsibilities of the individual team members. While planning, we revisited the timeline we had established during our initial planning conference with MCI and constructed the procedures we would use to complete the correspondence manual.

Our team examined the contracting specialist's individual training standards (ITS) to assist us in formulating what all to include in the contingency

contracting MCI. Each MOS has a number of ITSs that outline the core tasks a Marine is responsible for conducting in the performance of his or her duties. The ITSs selected for incorporation into the MCI will provide the nucleus of which the course will be constructed around.

***b. Analysis***

Next, our team reviewed the contracting specialist's ITSs. This was done to determine which ITSs applied when involved in a contingency environment and which ones were to be used in the correspondence manual. Task analysis worksheets were constructed for each of the ITS selected for incorporation into the MCI. Tasks that were felt necessary in the performance of contracting in a contingency environment that were not all addressed by established ITSs were also created. This process took a few weeks and resulted in a written task inventory or the accumulation of the task analysis worksheets. A sample task analysis worksheet is provided in Figure 3.

Figure 3: Sample Task Analysis Worksheet

JOB TITLE: Contingency Contracting Specialist/Officer TASK: Prepare follow-up on delinquent orders (3044.01.07) CONDITION: Given a delinquent procurement instrument/file, office SOP, and the reference. STANDARD: All delinquent procurement instruments receive follow-up action in a timely manner. ___X___ INSTRUCTION      ___ JOB AID      ___ INSTRUCTION/JOB AID Note:		
STEP NO.	PERFORMANCE STEP	SKILL/KNOWLEDGE
1	Review pending/open procurement instruments for delinquent shipments.	Review contracts and order forms. Identify delinquent shipments.
2	Contact the contractor to determine status of the overdue shipment.	Inquire with contract the nature of delinquency.
3	Negotiate delivery terms.	Identify best course of action to handle contractor delinquency. Identify new delivery date.
4	Document the action that will be taken to rectify the overdue shipment.	Create journal entry to document handling of delinquency. File entry in contract file.
5	Inform using unit of action taken.	Contact customer and inform him of the reason for delinquency and new delivery date.

Source: *Distant Learning & Technology Department, Performing and Documenting a Task Analysis*

***c. Design***

During the design phase, our team created instructional objectives for each task identified on the task analysis worksheets. The instructional objectives “reflect the

skill and knowledge needed to perform the task.”<sup>5</sup> The instructional objectives created are similar in content to the tasks found from the contracting specialist’s ITSs. By designing instructional objectives, the correspondence manual ensures the right focus and emphasis is given to the required skills needed to ensure a given task can be accomplished. The information in the manual focuses on instructional objectives and all lesson exercises are tailored to determine if the instructional objectives were achieved. During the design phase, the MCI was also organized into individual study units.

***d. Development***

The development phase is heavily reliant upon the work done in the design phase. For development, our team used the task analysis worksheets and the instructional objectives to write the MCI manual. It took several weeks to write and edit nine study units with each containing two to four lessons.

Each study unit and lesson is formatted using an Information Mapping technique used by the Marine Corps Institute. Each study unit and lesson begins with an introduction and a scope describing its contents. The objectives for each lesson were grouped and the information required to master that objective was researched and written into the study unit. Lesson exercises were also created to ensure adequate understanding of the course objectives occurred.

Completed study units were sent to MCI where they underwent further critique. Each study unit was formatted and edited by MCI personnel and all changes/recommendations were reviewed by our project team. Once the review process was completed, a draft copy was published. Although subject matter experts were consulted in regards to the content of the correspondence manual throughout this entire process, a final validation period will occur where the draft manual will be administered. Validation is conducted over a week period where Marines will complete the entire manual and provide feedback on its contents. The purpose of validation is to ensure the manual is understandable and ensures the content is relevant to contingency contracting. Those validating the manual will range in rank, contracting experience, and MOSs. Upon

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<sup>5</sup> Instructional System Design Draft, pg 7.

completion of the validation, recommendations will be reviewed and the manual updated accordingly. The validation period is currently slated for the first week in February.

*e. Implementation*

MCI is responsible for the implementation phase of ISD. They will publish and distribute the course material throughout the Marine Corps. The contingency contracting manual is then inputted into the MCI system where tests are corrected electronically in Washington D.C., and test results are included into Marine student's records of education and training. MCI will collect data regarding the results of the students learning.<sup>6</sup>

*f. Evaluation*

As time goes on, MCI will evaluate the data collected from the implementation stage. They will examine how "efficient and effective" the training manual has been in assisting the Marines. MCI will also review the course content for immediate or future revisions.<sup>7</sup>

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<sup>6</sup> Instructional System Design Draft, pg. 12.

<sup>7</sup> Ibid, pg. 14.

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### **III. PROBLEM IDENTIFICATION**

#### **A. SHORTAGE OF TRAINING**

There are only limited opportunities for formal contingency contracting training for the contracting specialists before entering into a contracting position and there is no Marine Corps sponsored training (currently CON234 is the only contingency contracting course Marines can attend). Other than the requirements set forth by DAWIA to obtain various certifications based on rank, there are no mandatory skill requirements that must be obtained prior to deploying in support of a contingency operation. Marine contracting specialists can be deployed at a moments notice to a contingency operation in support of Marine units and the countries where the contingency is occurring. No requirement to attend a formal school and the inability to attend CON234 limits the contract specialist's ability to acquire the requisite knowledge needed prior to supporting a contingency operation. A Marine contracting specialist may have as little as six months OJT, which does not provide a Marine with the experience needed to properly administer contracts and understand the rules and regulations of a contingency environment.

A lack of training for the contracting specialist can impede the mission of the Marines in the battlefield. Fair and reasonable prices may not be achieved due to a lack of competition. This can be caused because the contracting specialists may not understand or be creative enough to locate potential sources to provide supplies and services required by the warfighter in a timely manner. Also, there are different rules, regulations, business practices, and customs that the specialists may not be aware of that can hinder the relations with the local population within the area of the contingency. It is necessary for the Marine Corps to be viewed as favorable and helpful to the local population to show the areas that the Marines are "here to help." Without this impression, the local population and government will not be readily available or helpful to provide the necessary resources that are becoming more necessary in the contingency environments that the United States is currently facing and will possibly face in the near future.

## **B. CAUSES**

The shift toward the emphasis on contingency contracting in today's operational environment has put a tremendous strain on the Marine Corps. An environment that once was characterized by self-supportive units, has now been replaced by an environment where the emphasis on warfighters with an increase in the acquisition of support through contracting. Given this new scenario, the Marine Corps is beginning to reorganize its acquisition infrastructure to meet the new and demanding challenges. In assessing the Marine Corps' current ability to ensure that it has adequate contracting specialists to provide contracting support on the battlefield, we have identified several causes for the lack of contingency contracting training.

### **1. No Web-Based or Self-Guided Study**

Currently the Marine Corps does not have a web-based or self-guided study program for contingency contracting. Since there might be a requirement to send contracting specialists in a contingency environment without formal contingency contracting training, a correspondence manual or web-based course would at least provide them with some preparation on what they might encounter while operating in a contingency environment.

### **2. No Formal School Training**

In order to become a contract specialist, Marines must laterally move from the supply MOS. Once accepted, they undergo on the job training (OJT) at a Regional Contracting Office (RCO) for 6 months. During this "probationary period" the Regional Contracting Officer makes a determination on whether or not the Marine has the skills and aptitude to stay with the newly acquired MOS. If the 6-month OJT is completed successfully the Marine will then have to begin fulfilling his DAWIA requirements that are based on grade. Given this scenario, there is the potential that a Marine may be required to deploy in support of a contingency operation prior to being able to acquire the appropriate contingency contracting training. If Marines who joined the acquisition workforce were required to attend a formal school, where part of the curriculum was dedicated to contingency contracting, this gap in their training would not exist.



### **3. No Direct CON234 Supervision**

Although there is some oversight at the Logistics Branch on who attends CON234, there is not enough supervision to ensure that field contracting offices are sending their Marines in a timely manner. The Navy Director, Acquisition Career Management (DACM) office is responsible for managing the school seat quotas for all DAU courses for both the Navy and Marine Corps. The size of the acquisition workforce determines the number of quotas each service is given. The Logistics Branch takes a decentralized approach on ensuring Marines attend CON234. Each field contracting office makes reservations through the Navy's DAU registrar and attends the course accordingly. The only visibility the Logistic Branch has on who is slated to attend is by querying the Navy DAU registrar 30-90 days out from the time a given course is slated to occur to see who has registered. With this approach, there is potential for contracting offices not to send Marines in a timely manner and this will not become apparent to the Logistics Branch until too late. It is not believable that a cure all will be found to ensure that every contracting specialist who deploys in support of a contingency operation will have attended CON234; however, it is believed that more direction from higher headquarters could reduce the possibilities of a scenario like the one described from occurring.

### **4. No In-House Contingency Contracting Training**

There is currently no contingency contracting training administered by the Marine Corps. Although each individual contracting office may take steps to ensure that their personnel are trained prior to deployment in support of a contingency operation, the Marine Corps does not provide any type of mobile training team to prepare contract specialists.

### **5. Small Contracting Specialist Population**

Since the Marine Corps has a small contracting specialist population, due to various commitments, contracting offices are sometimes unable to send Marines to attend CON234 during the designated course dates. Although there are designated contingency contracting offices, due to the deployed operations tempo, many Marines filling billets in a base or station capacity are finding themselves deploying and conducting contingency contracting without the needed experience or training. With contracting specialists

finding themselves performing both contracting in support of garrison activities and contingency operations, the head of the contracting offices can be reluctant to give Marines up for a two-week period to attend training.

## **IV. RECOMMENDATIONS**

### **A. GENERAL**

Our recommendation, based on feasibility and cost effectiveness, is the publishing of a self-guided study. The recommendation that a contingency contracting correspondence manual be published is the byproduct of our report. We pursued this recommendation, and as mentioned in methodology, Section II, worked with the Marine Corps Institute to create this self-guided study. The draft copy of this manual can be found in Appendix A. Other potential solutions to fulfill the needed contingency contracting training have also been identified; however, they must be explored further to determine their feasibility. Recommendations have been broken into both short and long term. The self-guided study that we have drafted falls into the short-term category.

### **B. SHORT TERM - DEVELOP AND PUBLISH MARINE CORPS CONTINGENCY CONTRACTING MCI**

A correspondence manual on how to conduct contracting in a contingency environment should be developed for contracting personnel. In the absence of being able to attend formal training, a correspondence manual is a cost effective and easy way to learn the unique requirements placed on contracting personnel in a contingency environment. In the event contract specialists cannot attend a formal school or CON234, they can take the Contingency Contracting MCI. Although this is not meant to replace any formal training, it can augment or even fill the void in the event other training opportunities are unavailable. Another added benefit of correspondence based training is that the contracting office will not lose the contract specialist taking the course.

### **C. LONG TERM SOLUTIONS**

The following recommendations should be analyzed further to determine their feasibility. It is understood that further research may find these recommendations to be unachievable due to organizational or cost constraints.

#### **1. Attendance at Entry Level Air Force Contracting School**

The Air Force is the only service that has a formal school where enlisted personnel straight out of basic training are trained in the contract career field. Upon completion of a contracting specialist's 6 month probationary period with an RCO, and

upon the RCOs approval to remain in the 3044 MOS, Marines should be sent to the Air Forces' formal school. By attending a formal school where contingency contracting is covered, contract specialists will possess some knowledge early in the new career track on how to conduct contracting in a contingency environment prior to any deployments. Although it is understood that more in depth training occurs in CON234, in lieu of attending the DAU course, basic training from a formal school is considered better than nothing. It is also suggested that studies be conducted on the feasibility of a "joint" formal school.

## **2. Increase CON234 Quota Management**

Although the Logistics Branch at HQMC has some visibility on who attends CON234, their current role is more of tracking who completed the course and assisting contracting offices in getting Marines to the training. It is recommended that they take a more proactive role to ensure that all contracting specialists attend CON234. By taking a more centralized approach to managing the school seats, it is believed that a larger percentage of contracting specialists will attend CON234 each fiscal year. Based on who has already attended CON234, quotas should be given to various contracting offices for filling. It should be required that certain time frames be met and that all request through the Navy DAU registrar be routed through the Logistic Branch's office. It is understood that a decentralized approach to quota management has its benefits as it allows contracting offices to send Marines when it is most convenient for them. However, due to office commitments some contracting offices may fail to send Marines to the needed training. The mindset that attendance at CON234 should be like attending required Professional Military Education (PME) must be instilled.

## **3. Establish a Mobile Training Team (MTT)**

An in-house training team should be assembled to provide training for contracting specialists. Members of the team would come from the various contracting offices and would travel to various locations where the preponderance of contracting specialists are located and provide contingency contracting training. This training would occur once or twice a year and would augment the other forms of contingency contracting training already in existences. All travel expenses and required equipment would be funded by HQMC, contracts division. Although Marines would be unavailable to their contracting

office for a given period of time, the training cost is much more affordable. Other flexible solutions such as only holding half-day training could be instituted which allows contracting offices to have the Marines at work at least part of the work day.

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## **APPENDIX A: MARINE CORPS CONTINGENCY CONTRACTING MCI**

To access the link to the manual click [here](#).

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